

a clear vision
FOR THE SOUTH EAST



South East Plan

Technical Note 5 (Revised) Updated

Demography

UPDATED 4 OCTOBER 2006

POPULATION AND HOUSEHOLD PROJECTIONS

Purpose of this report

This technical note has been produced to assist the understanding of the population and household projections prepared for the South East England Regional Assembly to help inform development of the Draft South East Plan.

I. Introduction

- I.1 This technical note documents the Regional Assembly's work on population and household projections that helped inform the development of the Draft South East Plan published in January 2005¹. It also summarises work that was carried out after the Plan was submitted to Government in March 2006. The Assembly's work was considerably hampered and delayed by uncertainties and changes in respect of the Government's demographic projections, and as a result the Assembly's projections underwent a number of iterations between Autumn 2003 and Autumn 2004 as more up-to-date information became available on mortality and fertility rates, household composition and marital status and the Government's own (then) emerging sub-national population projections. The chronology of this process is important (see Section 3) and this note therefore deals with the various outputs in chronological order. At each stage of the process the Regional Assembly used what it considered to be the most up-to-date and robust set of demographic projections available.
- I.2 All of the projections set out in this note (except the Assembly's first round projection based on planned housing provision and fourth round projection based on the housing distribution in the South East Plan) are trend-based. They illustrate what would happen if past demographic trends were to continue. The projections are heavily dependant on the demographic assumptions used, particularly international and internal migration, marital status and the continuation of past trends in household formation. The projections are not policy-based forecasts and are just one of the factors to be taken into account when considering future housing provision. However, the projections do provide an important context for discussions regarding adequate and appropriate levels of future housing provision in the South East, future labour supply and the need for physical and social infrastructure.

¹ This work has been carried out with the assistance of the Regional Assembly's Demography Sub Group, and in particular that of its Chairman, Robin Edwards of Hampshire County Council.

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- 1.3 The projections relate solely to newly arising need and demand for housing. There is also a 'backlog of unmet housing need'. This is the number of households in unsuitable housing at a given point in time (in this case 2001) who cannot improve their situation by staying in their current home and who are unable to afford market prices. The assessment relates explicitly to the need for social rented housing or for accommodation that could be rented from private landlords with the aid of housing benefit. The Regional Assembly's assessment of backlog totals 29,000 households.
- 1.4 The backlog is considered further as part of the work on housing need carried out for the Regional Assembly by the Cambridge Centre for Planning and Housing Research².
- 1.5 All of the data presented in this report relates to the South East as a whole or to the sub-regions and rest of county areas. Figures relating to individual districts and county areas have not been published. District level projections are not considered to be sufficiently technically robust, while county areas do not form a geographical building block for the South East Plan which is based on sub-regions and rest of county areas.

2. Summary of Key Findings up to and including Third Round of Regional Assembly Projections

- 2.1 The Office for National Statistics (ONS) draft 2002-based sub-national population projections showed that population in the South East is projected to grow by 1,094,800 by 2027.
- 2.2 The age structure of the South East's population is projected to change significantly over the next twenty-five years. There will be a significantly smaller proportion of the population aged 25-44 in 2027, but a larger proportion aged over 65. By 2027 almost a quarter of the region's population will be aged over 65.
- 2.3 Almost 90 per cent of the total projected net in-migration for the region over the projection period is accounted for by the 0-15 and 25-44 age groups. The 25-44 year olds alone account for over 60 per cent. It is clear that without this net in-migration, the South East's working age population would fall significantly.
- 2.4 Net in-migration from other parts of the UK (as a whole) to the South East has been decreasing, from 93,800 between mid-1996 and mid-2001 to 64,500 between mid-1998 and mid-2003.

² Housing Need in the South East is available from the Regional Assembly's web site: http://www.southeast-ra.gov.uk/southeastplan/publications/research_reports.html

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- 2.5 Net in-migration from London to the South East has been increasing, from 161,200³ between mid-1996 and mid-2001 to 190,500 between mid-1998 and mid-2003.
- 2.6 London, the South West and East were the destination for 60 per cent of out-migrants from the South East and the source of 67 per cent of in-migrants. Migration flows were relatively insignificant in respect of other regions individually.
- 2.7 Net in-migration to the South East from the rest of the UK has been concentrated in the 16-24 and 25-44 age groups, ie. those of working ages. Net in-migration to the South East from London has been concentrated in those aged 25-44, but for those aged 16-24 the net flow is from the South East to London.
- 2.8 Between 1997 and 2002 there was a net annual average inflow of migrants to the South East from outside the UK of 12,500. Over the same period there was a net annual average inflow to the South East from the rest of the UK of 15,000 migrants.
- 2.9 If long-term trends in migration were to continue over the period 2001 to 2026, the South East would see the number of households increase by 723,800 (or 22 per cent). This is equivalent to an average 29,000 households per annum. The total number of net additional homes implied by such growth would be 746,200, equivalent to an annual average of 29,800. The twenty year period 2006 to 2026 would see a higher rate of growth, equivalent to an annual average of 31,300 homes per annum.
- 2.10 If short-term trends in migration were to continue over the period 2002 to 2027, the South East would see the number of households increase by 847,300 (or 26 per cent). This is equivalent to an average 33,900 households per annum. The total number of net additional homes implied by such growth would be 874,300, equivalent to an annual average of 35,000. The twenty year period 2006 to 2026 would see a higher rate of growth, equivalent to an annual average of 35,500 homes per annum.
- 2.11 Average household size is projected to fall. This implies that more dwellings will be required to house a given population.

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3. Regional Assembly & Official Demographic Projections: Key Dates and Outputs

Date	Outputs	Use in Draft South East Plan
1999	ONS and DETR official 1996-based Sub-National Population and Household Projections	Background
October 2003	First Round of Regional Assembly Population and Household Projections Short-term migration projection, long-term migration projection and projection based on current planned housing provision produced by Anglia Polytechnic University (APU) for the Regional Assembly. Projections took into account more recent data than the 1996-based official projections.	Published in Spring Debate Paper No. 4, 2004
March 2004	Second Round of Regional Assembly Projections (the ‘Interim Projections’) APU short-term migration population and household projection modified by the Regional Assembly to take into account 2001 Census information relating to the institutional population, marital status and household composition.	Used as the starting point for research commissioned by the Regional Assembly on housing need. Adjustments subsequently also used in the Regional Assembly’s third round of projections (see below).
April 2004	ONS Draft 2002-based Sub-National Population Projections	Used as the population component of the Regional Assembly’s third round short-term migration projection (see below).
July 2004	Third Round of Regional Assembly Projections Short-term migration projection using the ONS revised draft 2002-based sub-national population projection and consistent household projections prepared for the Regional Assembly by the Chairman of its Demography Sub Group. Long-term migration population and household projections prepared by APU. Regional and sub-regional outputs.	Used in the Draft South East Plan.
September 2004	ODPM Interim 2002-based Household Projections National and regional outputs. Population 2002-based, but household representative rates and marital status rates have not been updated and are the same as those used in the DETR 1996-based household projections.	Used as a comparison with the Regional Assembly’s third round of short-term migration projection.
November 2004	ONS 2003-based Sub-National Population Projections	Not available in time to inform the preparation of the Draft South East Plan, but included in this note for completeness.

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March 2006	ODPM 2003-based Household Projections	Not available in time to inform the preparation of the Draft South East Plan, but included in this note for completeness.
September 2006	Fourth Round of Regional Assembly Population and Household Projections Projections produced by Anglia Ruskin University for the Regional Assembly based on planned housing provision set out in South East Plan Policy H1 and nil net migration. Other inputs and assumptions use most up-to-date information available (see Annex 4).	Background

4. Official 1996-based Population and Household Projections

- 4.1 At the time the Draft South East Plan was being prepared the most up-to-date official sets of demographic projections were 1996-based. Sub-national 1996-based population projections were published by ONS in 1999⁴. 1996-based household projections were published by the Department of the Environment, Transport and the Regions in 1999.

Table 4.1: ONS 1996-based Sub-National Population Projections

	Change 1996 to 2021
South East	
Persons	1,009,700
of which:	
Natural Change	199,700
Total Net Migration	810,000
of which:	
Net Migration from the rest of England	525,000
Net Migration from other parts of the UK outside England and from the rest of the world	285,000

⁴ ONS, Sub-national population projections for England 1996-based, ONS Series PP3 no.10, 1999.

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Table 4.2: DETR 1996-based Household Projections (thousands)

	1996	2001	2006	2011	2016	2021
South East						
Household types:						
married couple	1,703	1,667	1,638	1,624	1,620	1,616
cohabiting couple	257	330	394	441	472	494
lone parent	146	158	163	163	162	160
other multi-person	232	258	288	323	358	387
one person	887	990	1,084	1,183	1,294	1,402
All households	3,225	3,403	3,567	3,735	3,905	4,060
Private household population	7,745	7,985	8,195	8,384	8,570	8,749
Average household size	2.40	2.35	2.30	2.25	2.20	2.16
Concealed couples	9	9	9	9	10	10
Concealed lone parents	10	10	10	9	9	9
England						
All households	20,186	20,992	21,733	22,519	23,313	24,000

4.2 Projected household growth in the South East between 1996 and 2021 was 835,000 (or 26 per cent). This is equivalent to an average annual increase of 33,400 households. Projected household growth in England as a whole was 3,814,000 (19 per cent). For the period 2001 to 2021 projected household growth in the South East was 657,000 households, equivalent to an average annual increase of 32,900 households.

5. Regional Assembly's First Round of Population and Household Projections

5.1 The Regional Assembly wished to take on board information from the 2001 Census, more recent data on migration trends and the Government Actuary Department's (GAD) 2000-based fertility and mortality rates. Therefore, in Autumn 2003 the Regional Assembly commissioned Anglia Polytechnic University (APU) to prepare three sets of population and household projections for the period 2001 to 2026 using the Chelmer Model ('Chelmer Projections'). The three variants were as follows:

- (i) short-term migration, based on assumptions that migration trends over the five years 1996 to 2001 will continue;
- (ii) long-term migration, based on assumptions that migration trends 1991 to 2001 will continue;

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- (iii) a continuation of current rates of planned housing provision. This final variant was run to establish a benchmark for comparative purposes. It was based on provisions made in structure plans to meet the average annual level of housing provision identified in Regional Planning Guidance for the South East (RPG 9), an allowance for additional development in the Growth Areas to 2016, and a continuation of RPG 9 rates of planned provision from 2016 to 2026.

Table 5.1: 2001-Based Projections for the Regional Assembly (First Round)

	2001	2006	2011	2016	2021	2026
South East						
Short-Term Migration						
Population	8,023,000	8,221,892	8,427,818	8,654,771	8,897,358	9,133,055
Households	3,287,549	3,405,179	3,546,494	3,704,192	3,850,725	3,961,707
Dwellings	3,391,878	3,513,026	3,658,719	3,821,354	3,972,493	4,086,983
Long-Term Migration						
Population	8,023,000	8,201,399	8,382,334	8,579,757	8,789,512	8,990,608
Households	3,287,549	3,400,061	3,553,357	3,683,904	3,821,455	3,922,820
Dwellings	3,391,878	3,507,697	3,646,101	3,800,274	3,942,077	4,046,594
Planned Housing Provision						
Population	8,023,000	8,280,609	8,482,461	8,679,417	8,900,398	9,205,976
Households	3,287,549	3,426,376	3,565,720	3,710,266	3,846,169	3,982,200
Dwellings	3,391,878	3,535,025	3,678,796	3,827,766	3,968,026	4,108,286

6. Regional Assembly Second Round of Population and Household Projections – the ‘Interim Projections’

- 6.1 The Regional Assembly’s initial population and household projections commissioned from Anglia Polytechnic University in Autumn 2003 were controlled to the total number of households in the 2001 Census, but did not take into account Census information relating to the institutional population, nor the marital status and household composition of the private household population. The Regional Assembly therefore commissioned the Chairman of its Demography Sub Group to undertake three strands of work for each of the county and unitary authorities based on the (Chelmer) projections prepared by APU in Autumn 2003.
- (i) 2001 Census-based estimates of the institutional population by five-year age group, gender and marital status were prepared and subtracted from the 2001 Census total populations to provide 2001 Census private household populations by five-year age group, gender and marital status for each area.
- (ii) The marital status structure of the 2001 base private household populations in the Chelmer projections was modified to make them consistent with the

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2001 Census structure derived above. The projected marital status proportions for subsequent years were also modified to reflect the differences between the 2001 Census proportions and those assumed in the 2001 base for the Chelmer projections.

- (iii) The 2001 household representative rates used in the Chelmer projections were modified so that, when applied to the 2001 Census private household population by age, gender, and marital status, the outcome was the total numbers of households by household type from the 2001 Census. The projected trend in each headship rate from 2001 to 2021 was then adjusted to reflect the estimated trend between the 1991 Census rates and the modified rates for 2001. Headship rates for 2026 were calculated by assuming the numerical change in each rate 2021 to 2026 would equal that projected for the period 2016 to 2021.

- 6.2 The short-term migration projection prepared by Anglia Polytechnic University was adjusted accordingly to form the Regional Assembly's interim population and household projection. This interim household projection formed the basis for the work on housing need carried out for the Regional Assembly by the Cambridge Centre for Planning and Housing Research.

Table 6.1: Regional Assembly Interim (Second Round) 2001-based Household Projections

	2001	2006	2011	2016	2021	2026
South East						
Household types:						
married couple	1,666,806	1,606,433	1,572,137	1,558,915	1,547,971	1,508,018
cohabiting couple	314,295	355,970	402,278	432,573	459,468	484,198
lone parent	189,418	201,716	212,091	222,965	235,767	251,631
other multi-person	192,818	209,976	234,694	258,136	278,941	301,142
one person	941,498	1,024,634	1,122,722	1,229,729	1,335,468	1,450,525
All households	3,304,835	3,398,730	3,543,922	3,702,319	3,857,615	3,995,513

7. ONS Draft 2002-based Sub-National Population Projections

- 7.1 Draft ONS 2002-based sub-national population projections were originally published for consultation on 1 April 2004⁵. Due to a number of technical problems, those projections were withdrawn by ONS and replaced with a corrected set of projections on 30 April 2004. These revised draft projections

⁵ The consultation has a very specific and technical remit. Local authorities and health authorities are asked by OPDM to comment on the internal migration assumptions used in the first year of the projections based on past trends over the previous five years.

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were subsequently used by the Regional Assembly as the basis for its projections based on a continuation of short-term migration trends. They were the first set of projections used by the Regional Assembly to take on board the GAD 2002-based fertility and mortality rates. The GAD 2002-based mortality rate projections are important because they project substantially higher survival rates than previous projections, thus increasing the growth rate of the over 65 years age group.

Table 7.1: ONS Draft 2002-based Sub-National Population Projections

	Change 2002 to 2027
South East	
Persons	1,094,800
of which:	
Natural Change	348,500
Total Net Migration	833,900
of which:	
Net Migration from the rest of England	500,300
Net Migration from other parts of the UK outside England and from the rest of the world	333,600
Net Unattributable Population Change	-87,500

Table 7.2: ONS Draft 2002-based Sub-National Population Projection (thousands)

	2002	2003	2007	2012	2017	2022	2027	2002-2027
South East								
Ages 0-15	1,586.0	1,581.9	1,549.0	1,524.5	1,539.5	1,575.9	1,605.5	19.5
Ages 16-24	861.7	875.4	928.7	949.4	908.7	882.5	892.0	30.3
Ages 25-44	2,300.8	2,286.6	2,246.0	2,175.6	2,180.7	2,241.6	2,261.4	-39.4
Ages 45-64	1,969.4	1,996.0	2,133.0	2,248.8	2,326.6	2,344.4	2,312.4	343.0
Ages 65-74	672.5	679.4	697.4	821.9	926.6	923.1	979.3	306.8
Ages 75 plus	648.1	653.5	686.0	735.0	803.1	952.1	1,082.7	434.6
All Ages	8,038.4	8,072.7	8,240.1	8,455.1	8,685.3	8,919.5	9,133.2	1,094.8

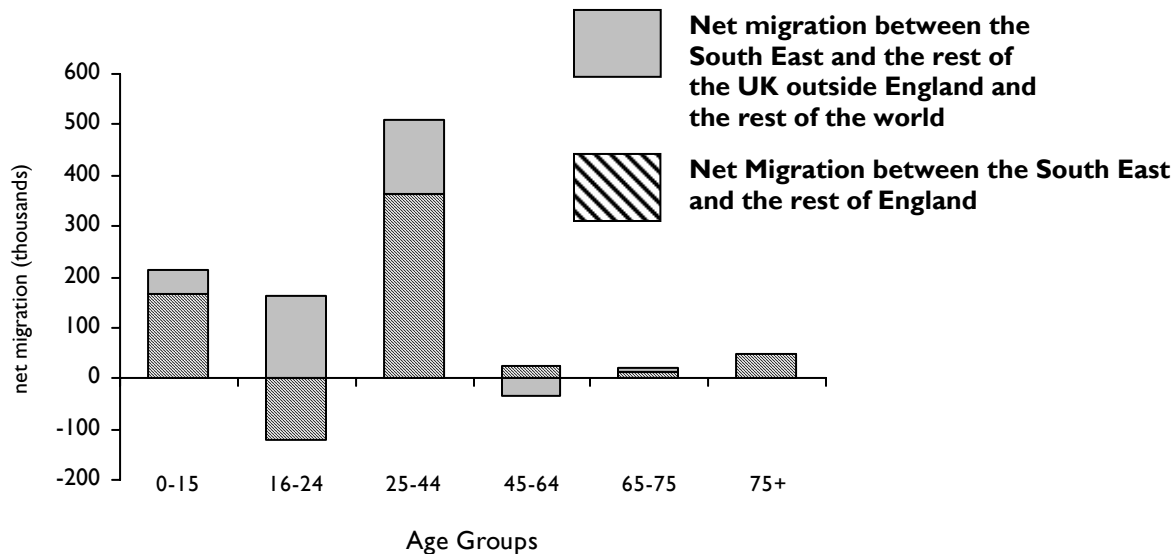
- 7.2 The projections show that over the twenty-five year period 2002 to 2027, the population in the South East is expected to grow by 1,094,800.
- 7.3 Natural change (the difference between births and deaths, which includes the effects of the aging population) is an increasingly important driver of population growth in the South East. In the ONS draft 2002-based population projections natural change accounts for 32 per cent of projected growth, compared with just 20 per cent in the Government's last round of official (1996-based) projections.

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- 7.4 The projections show the population growing at a fairly consistent rate, albeit with the rate of net migration increasing marginally through the 25 years.
- 7.5 This overall increase hides significant variations between the age groups. The only age group to decrease in absolute terms over the 25 year period is the 25-44 age group, despite significant levels of net in-migration, equivalent to a net inflow of some 20,000 25-44 year olds a year into the region (over half a million over the twenty-five years). Natural decrease is significant in the earlier part of the projection period and it is only towards the end of the period that the population of 25-44 year olds starts to increase back towards its 2002 level. The other age group which is projected to experience major net in-migration is the 0-15 year olds (which is to be expected as a corollary of the 25-44 year olds) and in general the overall pattern of change in the young population reflects their parents' pattern.
- 7.6 Despite large gross flows in and out of the South East, the 16-24 age group is expected to experience only modest net in-migration (due partly no doubt to a greater propensity for the region's residents of this age group to move elsewhere in the country). Changes in the overall population level over the projection period are due therefore to natural change, largely a function of the changing numbers of younger children earlier in the period working through into this age group.
- 7.7 There is predicted to be little net migration for the over 45s (indeed slight net out-migration for those aged 45-64). Thus population change in these age groups is almost entirely due to natural change. Although the total number of people in all age groups over the age of 45 is predicted to increase, the rate of increase decelerates for the 45-64s whilst accelerating for the over 75s.
- 7.8 Almost 90 per cent of the total net in-migration for the region over the projection period is therefore accounted by the 0-15 and 25-44 age groups. The 25-44 year olds account for over 60 per cent alone. It is clear that without this net in-migration, the South East's working age population would fall significantly.
- 7.9 60 per cent of projected net in-migration into the South East is from the rest of England with the remaining 40 per cent from the rest of the UK outside England and the rest of the world. This pattern is predicted to remain constant throughout the projection period. Figure 7.1 shows that projected net migration from the rest of the UK outside England and the rest of the world is concentrated in the 16-24 and 25-44 age groups. In the case of 16-24 year olds the net in-migration from the rest of the UK outside England and the rest of the world more than counterbalances the net out-migration evident in the migration flows between the South East and the rest of England.

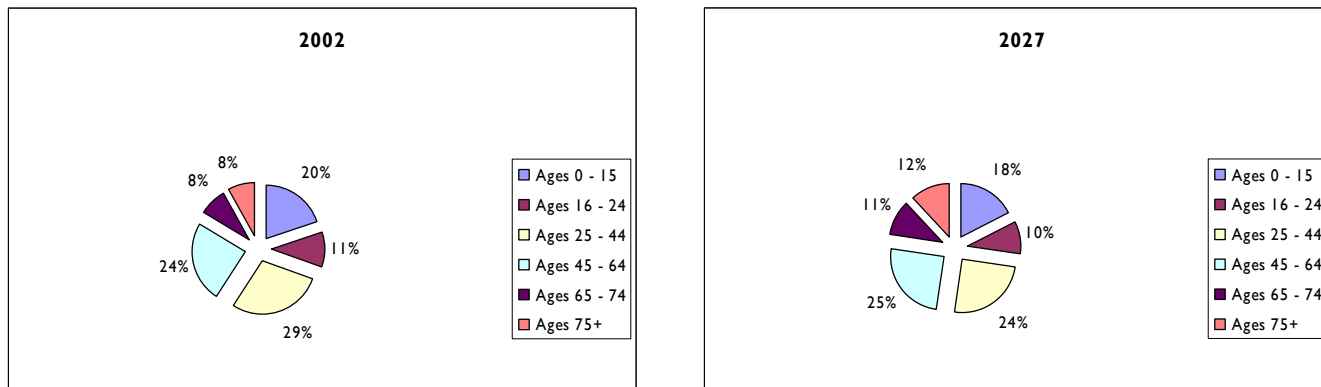
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Figure 7.1: ONS Projected Net Migration 2002 to 2027



7.10 Figure 7.2 shows how the age structure of the South East’s population is projected to change over the period 2002 to 2027. There will be a significantly smaller proportion of the population aged 25-44 in 2027, but a larger proportion aged over 65. By 2027 almost a quarter of the region’s population will be aged over 65.

Figure 7.2: Age Composition of the Population at 2002 and 2027



Source: ONS Draft 2002-Based Population Projections

8. Migration Trends

8.1 The principal source of historic data on migration flows within the UK is from the NHS Central Register (NHSCR), based on patient registrations. Data has been analysed for the five year periods 1996 to 2001, 1997 to 2002 and 1998 to 2003.

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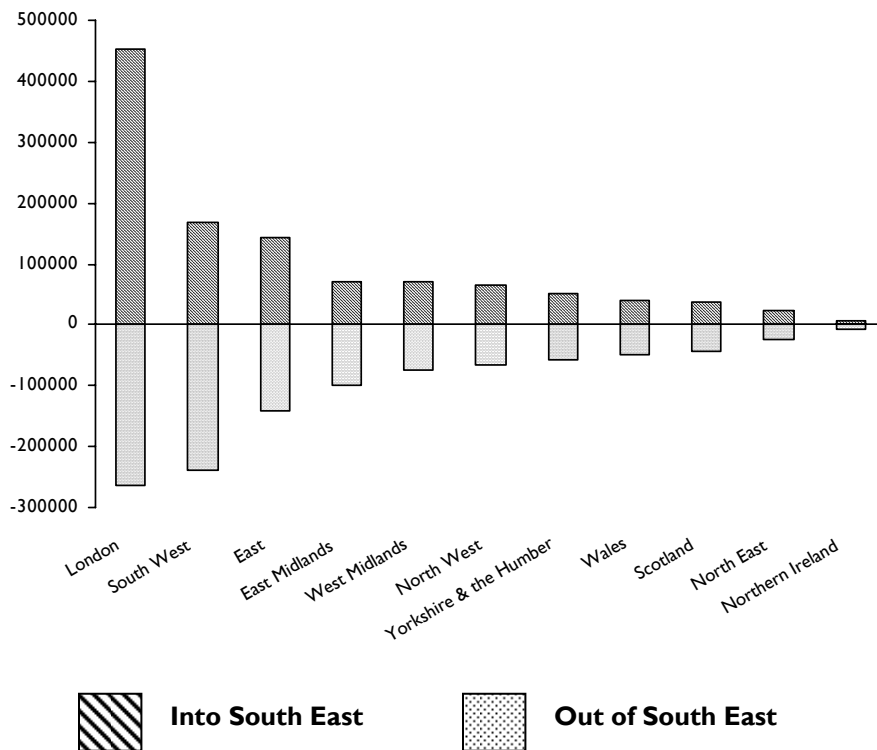
- 8.2 Net migration to or from the South East declined in respect of all regions except London (ie. net out-migration increased, net in-migration decreased or net in-migration turned to net out-migration). Although net in-migration from London increased, contrary to the trend for the other regions, in overall terms this resulted in a fall in in-migration into the South East. Between 1996 and 2001 net in-migration from other parts of the UK to the South East decreased from 93,800 mid-1996 to mid-2001 to 64,500 mid-1998 to mid-2003. This trend was due to both out-migration from the South East to other regions increasing and in-migration from other regions decreasing. The reverse is true for London, where out-migration from the South East to London fell and in-migration to the South East from London grew. Net in-migration to the South East from London was 161,200⁶ between mid-1996 and mid-2001 and 190,500 between mid-1998 and mid-2003.
- 8.3 As illustrated in Figure 8.1, London, the South West and East were the destination for 60 per cent of out-migrants from the South East and the source of 67 per cent of in-migrants⁷. Migration flows were relatively insignificant in respect of other regions individually, although the remainder of the UK accounted for 33 per cent of in-migrants and 40 per cent of out-migrants. The largest interaction in terms of both in-migration and out-migration was with London. The South West attracted almost as many out-migrants as London (but as will be seen later these tend to have different characteristics) resulting in the largest net out-migration from the South East. There was also net out-migration to the East Midlands. Although gross flows to and from the East were higher than for the East Midlands they were more in balance, so that net migration between the East and South East was almost zero.

⁶ This figure is slightly different from that quoted in the Draft South East Plan (Table A1 reproduced in Annex 1 of this report) because it has been derived from data for a slightly different twelve month period.

⁷ The percentages quoted relate to the 1998-2003 period. Figures for 1996-2001 and 1997-2002 vary only by a percentage point or two.

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Figure 8.1: Migration Flows between the South East and other parts of the UK 1998 to 2003



- 8.4 Two-thirds of both in-migration to and out-migration from the South East is in the 16-24 and 25-44 year age groups. In and out migration for the 16-24 year olds is, however, more evenly balanced than the older age group so that the net migration impact is less pronounced; relatively minor net out-migration was evident (which is projected in the draft 2002-based projections to become a small net in-migration). In contrast, the 25-44 age group not only has large gross flows but also the greater imbalance between them leads to a relatively large net in-migration for this age group.
- 8.5 The 16-24 year age group is by far the most likely to move into or out of the South East. The 24-44 age group also has a higher than average propensity to move, although considerably lower than the younger age group. Propensity to migrate to or from the South East falls considerably with age.
- 8.6 The patterns of migration to and from individual regions vary. For migration to the South East, most regions (North East, North West, Yorkshire & Humberside, East Midlands, West Midlands, South West and Wales) have higher than average proportions of their migrants in the 16-24 age group, whilst from Scotland it is the 25-44 year age group which is higher than average. London's pattern is the most markedly different, with both age groups over-represented. Whilst student moves will be responsible for some of this overall pattern, it would seem that in terms of

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job-related migration, in-migrants from London may be a mixture of first job/early career and later career/promotion, whilst from other regions moves are more focused on the former category.

- 8.7 For migration from the South East, London once again features the 16-24 and 25-44 age groups. However, in the case of 16-24 year olds, the resulting net flow is to London, whereas for the 25-44 year olds it is to the South East (and the net flow is much higher in the latter case).
- 8.8 Out-migration to other regions falls into two broad patterns. The North East, Yorkshire & Humberside and the West Midlands have a higher proportion than average of 16-24 year olds, whilst for the South West, Wales and Scotland it is the older age groups (45 and above) that feature more heavily. This suggests that for these latter regions, retirement and economic downsizing migration features more significantly than elsewhere.
- 8.9 For regions having large flows to and from the South East (such as London) even a lower than average proportion for a particular age group will still result in large absolute numbers compared with other regions. Equally, the small absolute numbers involved in the less significant regions will dampen down the effects of the age profile of its migrants.
- 8.10 Many of the inter-regional movements may be relatively short-distance and may not impact on labour supply in the South East (although it would impact on commuting patterns).
- 8.11 Table 8.1 shows international movements to and from the South East between 1997 and 2002.

Table 8.1: Annual Average International Movements 1997 to 2002

	South East
Inflow	62,000
Outflow	48,500
Net	12,500

Source: International Passenger Survey

9. Regional Assembly's Third Round of Population and Household Projections

- 9.1 Following publication of the ONS draft 2002-based sub-national population projections (based on migration trends in the period 1997 to 2002 and incorporating the GAD 2002-based fertility and mortality rates) two further sets of demographic projections were prepared for the South East. The first projection was produced by Anglia Polytechnic University using the Chelmer Model. It is based on long-term (ie. ten year) migration trends. The second projection was prepared by the Chairman of the Regional Assembly's Demography Sub Group. It

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is based on the ONS draft 2002-based sub-national population projections; as such it is based on short-term (ie. five year) migration trends.

Long-Term Migration Projection

- 9.2 The fundamental controlling assumption in this projection is a continuation of the long-term net migration trend based on the ten years from 1991 to 2001. The resulting population projection is the result of that control together with the projections of natural change (the difference between births and deaths). The household projections are determined by the application of the 2001 Census derived representative rates to the projected private household population, structured by the 2001 Census derived marital status assumptions. The household projections are constrained by the assumptions made regarding net migration.
- 9.3 The assumptions used in the 2001-based long-term migration projection prepared by Anglia Polytechnic University are set out in Annex 2 to this note.

Table 9.1: 2001-based Long-Term Migration Projection (Third Round)

	2001	2006	2011	2016	2021	2026
South East						
Population	8,023,000	8,203,412	8,388,126	8,588,663	8,802,572	9,008,081
Households	3,304,263	3,421,760	3,572,359	3,736,458	3,891,937	4,028,047
Dwellings	3,408,950	3,529,950	3,685,219	3,854,445	4,014,789	4,155,133
Labour Supply	4,052,439	4,202,264	4,348,818	4,461,690	4,554,595	4,539,823

- 9.4 If long-term trends in migration were to continue over the period 2001 to 2026, the South East would see the number of households increase by 723,800 (or 22 per cent). This is equivalent to an average 29,000 households per annum. Population would increase by 985,100 (or 12 per cent) over the same period. The total number of net additional homes implied by such growth would be 746,200, equivalent to an annual average of 29,800⁸.
- 9.5 The twenty year period 2006 to 2026 would see a higher rate of growth: 606,300 households, or an average 30,300 households per annum. The total number of net additional homes implied by such growth would be 625,200, equivalent to an annual average of 31,300.
- 9.6 Household size is projected to fall from 2.37 persons per household in 2001 to 2.18 in 2026. This implies that more homes will be needed to house a given population.
- 9.7 It is projected that net migrants will comprise 33 per cent of the household growth between 2001 and 2026 (235,700 households). Between 2006 and 2026 net migrants will account for 31 per cent of projected household growth (190,200

⁸ The household to dwelling ratio is calculated by the Chelmer Model.

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households). The remainder of the projected household growth is internally generated.

Short-Term Migration Projection

- 9.8 The population component of this projection is the ONS revised draft 2002-based sub-national population projection issued for consultation in April 2004. Household projections consistent with these population projections were prepared on behalf of the Regional Assembly by the Chairman of its Demography Sub Group. The projections are constrained by the assumptions made regarding total population.
- 9.9 The draft 2002-based sub-national population projections were for broad age groups and gender. For each county these were disaggregated to five-year age groups using data from the GAD 2002-based population projections for England. Estimates of the private household population by five-year age group and gender were obtained by subtracting the institutional population derived from the previous work on the Chelmer projections prepared for the Regional Assembly in 2004. The marital status structure (also derived from the work on the Chelmer projections prepared in 2004) was applied to the resulting ONS sub-national private household populations. The household representative rates from the work on the Chelmer projections prepared in 2004 were then applied to produce household projections by household type.
- 9.10 It should be noted that the marital status and headship rates from the Chelmer projections for 2001, 2006, etc. to 2026 were applied to the ONS sub-national population projections for 2002, 2007, etc. to 2027. Whilst this will obviously have a small effect on the magnitude of the household projections for individual years, the effect on projected household change between 2002 and 2027 is likely to be minimal.
- 9.11 The household estimates for virtual counties were disaggregated to the constituent unitary authorities and district councils using the projected average household sizes in the Chelmer short-term net migration projections. Initial estimates of the number of households in each district and unitary authority in 2002 and 2027 were obtained by dividing the sub-national population projections, after subtracting the institutional populations, by the Chelmer projected average household sizes. These district and unitary initial household estimates were then controlled to sum to the household estimates in the virtual counties for 2002 and 2027 that were produced in the first stage of the exercise.
- 9.12 District and unitary household estimates for intermediate years were initially produced by interpolation between 2002 and 2027, and then controlled to the virtual county estimates for the appropriate years.
- 9.13 The dwelling equivalents have been calculated using the same household to dwelling ratios as those used in the long-term migration projection.

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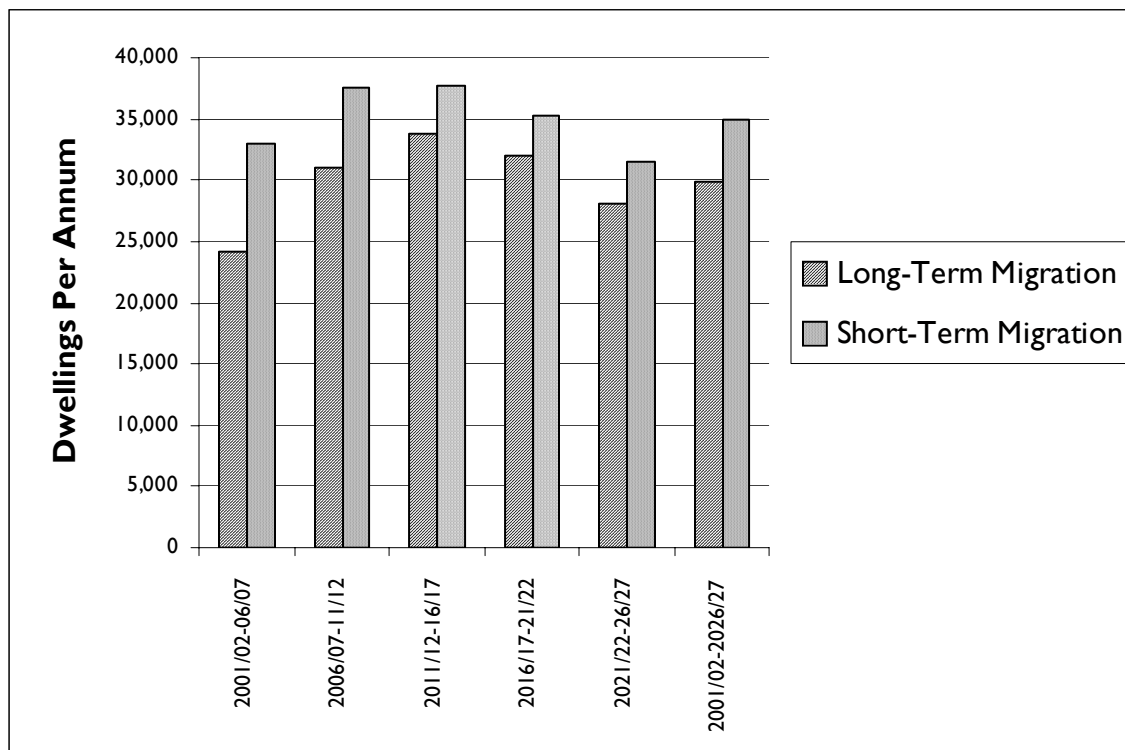
Table 9.2: 2002-based Short-Term Migration Projection (Third Round)

	2002	2007	2012	2017	2022	2027
South East						
Population	8,038,400	8,240,400	8,455,000	8,685,700	8,919,200	9,133,200
Households	3,312,585	3,472,331	3,654,256	3,836,883	4,007,437	4,159,888
Dwellings	3,417,942	3,582,769	3,770,480	3,958,915	4,134,894	4,292,192
Labour Supply	3,996,282	4,159,461	4,317,421	4,442,078	4,530,610	4,551,670

9.14 If short-term trends in migration were to continue over the period 2002 to 2027, the South East would see the number of households increase by 847,300 (or 26 per cent). This is equivalent to an average 33,900 households per annum. The total number of net additional homes implied by such growth would be 874,300, equivalent to an annual average of 35,000. The twenty year period 2007 to 2027 would see a higher rate of growth: 687,600 households, or an average 34,400 households per annum. The total number of net additional homes implied by such growth would be 709,400, equivalent to an annual average of 35,500.

9.15 Figure 9.1 compares the levels of housing growth that would be implied by the Regional Assembly’s latest (third round) sets of demographic projections.

Figure 9.1: Levels of Housing Provision Implied by the Third Round of Demographic Projections



Note: The long-term migration projections relate to five year intervals from 2001 to 2026 and the short-term migration projections to five year intervals from 2002 to 2027.

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Sub-Regional Projections

- 9.16 Projected population and household growth based on long-term and short-term migration trends was calculated for each of the sub-regional areas and for each of the remaining county areas. These are not true sub-regional projections but have been derived from projections for each district and unitary area in the region. A detailed explanation of the methodology used to arrive at the projections for each sub-regional area and each of the remaining county areas is set out in Annex 3.

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Table 9.3: 2001-based Long-Term Migration Projections – Sub-Regions

	2001	2006	2011	2016	2021	2026
Central Oxfordshire						
Population	391,970	400,631	408,238	415,175	421,910	428,251
Households	154,678	159,583	164,728	169,947	175,441	181,044
Dwellings	159,014	164,052	169,345	174,718	180,369	186,126
Labour Supply	202,098	208,748	214,491	218,705	222,056	219,228
East Kent & Ashford						
Population	575,346	585,757	597,685	611,565	626,537	640,549
Households	237,446	243,970	253,588	264,969	276,012	286,132
Dwellings	249,959	256,776	266,875	278,836	290,450	301,090
Labour Supply	260,558	270,106	279,309	286,444	292,532	292,201
Gatwick						
Population	313,860	324,660	336,315	349,477	363,925	378,435
Households	130,068	135,688	143,404	151,836	159,086	165,919
Dwellings	132,782	138,505	146,373	154,968	162,355	169,316
Labour Supply	164,325	173,642	182,934	190,939	197,981	200,925
Isle of Wight						
Population	132,700	135,828	139,707	144,458	149,737	154,818
Households	57,569	60,035	62,870	65,868	68,700	70,620
Dwellings	61,501	64,135	67,164	70,367	73,393	75,444
Labour Supply	58,174	61,172	64,245	66,954	69,203	70,169
London Fringe						
Population	823,559	838,304	852,728	868,684	886,710	905,307
Households	338,024	347,358	358,553	372,043	386,322	400,345
Dwellings	346,673	356,248	367,737	381,575	396,232	410,624
Labour Supply	425,210	436,828	450,489	462,418	472,959	471,744
South Hampshire						
Population	955,004	971,789	989,715	1,009,722	1,031,178	1,051,261
Households	390,057	405,247	422,400	440,541	456,891	470,520
Dwellings	400,550	416,078	433,626	452,187	468,904	482,826
Labour Supply	476,345	493,749	508,911	519,590	527,106	522,684
Sussex Coast						
Population	968,974	990,875	1,017,697	1,049,273	1,084,311	1,119,680
Households	427,912	440,421	461,280	485,223	507,849	529,033
Dwellings	444,715	457,729	479,422	504,310	527,823	549,834
Labour Supply	453,073	476,021	499,422	520,203	539,068	545,203
Western Corridor & Blackwater Valley						
Population	1,424,736	1,456,437	1,485,948	1,515,403	1,545,368	1,573,157
Households	569,367	591,191	617,029	643,330	666,998	686,228
Dwellings	583,729	606,046	632,475	659,382	683,596	703,263
Labour Supply	770,989	793,488	815,326	830,569	842,357	833,966

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Table 9.4: 2001-based Long-Term Migration Projections – Remaining County Areas

	2001	2006	2011	2016	2021	2026
Rest of Berkshire						
Population	15,132	15,396	15,611	15,820	16,024	16,183
Households	6,010	6,151	6,388	6,618	6,797	6,891
Dwellings	6,143	6,288	6,529	6,765	6,947	7,044
Labour Supply	8,332	8,528	8,683	8,726	8,717	8,477
Rest of Buckinghamshire (exc. Milton Keynes/Aylesbury Sub-Region)						
Population	135,610	136,322	136,876	137,495	138,196	138,738
Households	54,942	55,613	56,727	58,105	59,749	60,648
Dwellings	56,455	57,143	58,285	59,699	61,387	62,311
Labour Supply	68,742	68,931	69,337	69,608	69,636	67,934
Rest of East Sussex						
Population	136,265	140,228	144,753	150,121	156,100	162,078
Households	61,543	63,730	67,145	70,717	74,232	77,464
Dwellings	64,473	66,756	70,324	74,059	77,735	81,115
Labour Supply	62,189	65,393	68,556	71,262	73,857	74,790
Rest of Hampshire						
Population	384,450	396,209	407,393	419,113	431,323	442,919
Households	161,027	168,601	177,636	187,445	196,539	204,397
Dwellings	165,920	173,717	183,022	193,127	202,492	210,584
Labour Supply	194,665	202,846	210,837	216,576	221,486	221,107
Rest of Kent (exc. Thames Gateway)						
Population	306,479	310,676	314,067	317,582	321,407	324,850
Households	127,171	130,043	133,886	138,277	142,384	145,790
Dwellings	130,628	133,579	137,529	142,040	146,261	149,762
Labour Supply	153,850	156,229	158,932	160,320	161,099	157,918
Rest of Oxfordshire						
Population	210,502	215,424	219,767	224,138	228,776	233,196
Households	86,105	88,740	91,952	95,361	98,719	101,903
Dwellings	88,986	91,707	95,026	98,551	102,021	105,310
Labour Supply	113,670	117,051	120,602	123,032	124,868	123,216
Rest of Surrey						
Population	106,443	106,969	107,584	108,330	109,129	109,792
Households	43,870	44,604	45,562	46,693	47,781	48,780
Dwellings	45,039	45,792	46,775	47,936	49,053	50,077
Labour Supply	53,436	54,138	54,755	55,102	55,393	54,313
Rest of West Sussex						
Population	115,296	119,475	123,877	128,739	133,940	139,069
Households	49,100	51,157	53,987	57,101	59,674	62,024
Dwellings	51,025	53,151	56,079	59,301	61,957	64,384
Labour Supply	56,850	59,773	62,731	65,241	67,513	68,218

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Table 9.5: 2002-based Short-Term Migration Projections – Sub-Regions

	2002	2007	2012	2017	2022	2027
Central Oxfordshire						
Population	391,843	402,089	411,559	420,413	429,355	438,496
Households	155,398	166,005	175,240	183,537	192,269	200,056
Dwellings	159,740	170,644	180,137	188,666	197,641	205,646
Labour Supply	199,069	209,403	218,171	225,175	229,912	231,123
East Kent & Ashford						
Population	578,766	596,934	616,179	637,004	658,712	679,495
Households	243,409	254,862	268,943	283,729	298,052	311,781
Dwellings	256,291	268,326	283,127	298,671	313,728	328,159
Labour Supply	258,253	271,002	281,974	290,340	296,956	299,922
Gatwick						
Population	313,160	320,265	328,080	336,645	345,292	353,248
Households	127,916	132,826	139,166	145,924	151,425	156,639
Dwellings	130,584	135,599	142,074	148,976	154,595	159,921
Labour Supply	160,954	166,524	172,555	177,668	180,877	180,951
Isle of Wight						
Population	134,900	143,000	151,000	159,000	166,800	173,900
Households	58,520	64,188	68,953	73,973	79,344	84,092
Dwellings	62,517	68,572	73,662	79,026	84,764	89,836
Labour Supply	58,358	62,791	66,981	70,203	72,706	73,574
London Fringe						
Population	824,327	841,896	862,292	884,951	908,821	931,163
Households	338,755	352,188	368,062	384,424	400,621	416,561
Dwellings	347,431	361,189	377,450	394,213	410,805	427,135
Labour Supply	419,283	433,035	450,658	466,593	478,980	484,366
South Hampshire						
Population	958,022	978,586	1,000,497	1,022,878	1,044,594	1,064,777
Households	396,968	414,803	433,942	451,953	468,017	482,011
Dwellings	407,663	425,941	445,559	464,018	480,479	494,815
Labour Supply	471,464	491,534	507,607	517,155	522,381	520,325
Sussex Coast						
Population	970,851	1,002,808	1,037,189	1,074,464	1,112,479	1,148,235
Households	434,092	458,313	487,897	518,204	545,885	571,882
Dwellings	451,089	476,248	506,978	538,460	567,214	594,218
Labour Supply	448,131	475,668	500,781	521,738	537,060	544,257
Western Corridor & Blackwater Valley						
Population	1,422,636	1,442,830	1,465,332	1,491,430	1,517,453	1,539,605
Households	565,141	586,715	612,339	637,458	658,270	673,250
Dwellings	579,387	601,471	627,707	653,427	674,738	690,068
Labour Supply	756,998	776,836	797,138	813,081	823,534	821,614

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Table 9.6: 2002-based Short-Term Migration Projections – Remaining County Areas

	2002	2007	2012	2017	2022	2027
Rest of Berkshire						
Population	15,069	15,278	15,540	15,864	16,210	16,492
Households	6,053	6,277	6,553	6,824	7,024	7,146
Dwellings	6,187	6,416	6,698	6,975	7,180	7,304
Labour Supply	8,116	8,309	8,528	8,706	8,854	8,830
Rest of Buckinghamshire (exc. Milton Keynes/Aylesbury Sub-Region)						
Population	134,493	131,825	130,399	129,854	129,885	130,212
Households	53,434	53,814	54,609	55,461	56,301	56,473
Dwellings	54,904	55,293	56,109	56,983	57,844	58,019
Labour Supply	66,861	64,525	63,530	62,899	62,288	61,294
Rest of East Sussex						
Population	135,730	138,719	141,959	145,965	150,525	155,043
Households	57,973	60,575	63,906	67,255	70,449	73,387
Dwellings	60,748	63,467	66,951	70,453	73,793	76,866
Labour Supply	60,725	62,819	64,696	66,239	67,554	67,982
Rest of Hampshire						
Population	386,121	391,398	397,329	404,790	413,383	421,228
Households	158,379	165,784	173,712	181,189	187,885	193,747
Dwellings	163,189	170,818	178,986	186,689	193,588	199,627
Labour Supply	192,167	196,120	199,659	201,793	202,928	201,467
Rest of Kent (exc. Thames Gateway)						
Population	306,311	313,045	320,600	329,058	338,192	346,542
Households	124,334	129,377	135,759	142,494	148,993	155,194
Dwellings	127,714	132,895	139,453	146,374	153,051	159,423
Labour Supply	150,898	155,387	161,044	166,046	169,940	171,497
Rest of Oxfordshire						
Population	210,828	216,912	222,979	229,356	235,750	241,363
Households	85,534	91,809	97,327	102,319	107,551	112,254
Dwellings	88,395	94,876	100,572	105,726	111,128	115,983
Labour Supply	111,837	117,498	122,781	126,909	129,717	130,061
Rest of Surrey						
Population	106,702	108,294	110,481	113,099	116,064	118,685
Households	43,566	44,989	46,717	48,505	50,273	52,011
Dwellings	44,727	46,188	47,962	49,797	51,612	53,397
Labour Supply	52,505	54,035	55,771	57,479	58,781	59,407
Rest of West Sussex						
Population	115,451	118,769	122,054	125,790	129,663	133,282
Households	48,559	50,688	53,388	56,264	58,593	60,799
Dwellings	50,469	52,676	55,475	58,459	60,873	63,160
Labour Supply	55,989	58,651	60,833	62,464	63,617	63,669

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10. ODPM Interim 2002-based Household Projections

10.1 Interim 2002-based projections of the numbers of households in England to 2021 were published by the Office of the Deputy Prime Minister (ODPM) on 8 September 2004⁹. The projections are based on the ONS revised draft 2002-based sub-national population projections. However, the household representative rates and marital status rates are the same as those used in the DETR 1996-based household projections and have not been updated.

Table 10.1: ODPM Interim 2002-based Household Projections (thousands)

	2001	2006	2011	2016	2021
South East					
Household types:					
married couple	1,649	1,614	1,603	1,607	1,615
cohabiting couple	324	386	434	465	488
lone parent	158	164	165	165	165
other multi-person	251	273	305	338	366
one person	965	1,061	1,164	1,280	1,392
All households	3,348	3,498	3,672	3,855	4,025
Private household population	7,831	8,007	8,215	8,439	8,669
Average household size	2.34	2.29	2.24	2.19	2.15
Concealed couples	9	9	10	10	11
Concealed lone parents	10	10	10	10	10
England					
All households	20,750	21,658	22,639	23,641	24,522

10.2 Projected household growth in the South East between 2001 and 2021 is 677,000 (or 20 per cent). This is equivalent to average annual increase of 33,900 households. Projected household growth in England as a whole is 3,772,000 (18 per cent). Household size in the South East is projected to fall from 2.34 persons per household in 2001 to 2.15 in 2021.

10.3 Final 2003-based household projections are due to be published by ODPM in 2005. They will be based on:

- o 2003-based sub-national population projections;
- o updated marital status projections; and,

⁹ Available from the ODPM web site: www.odpm.gov.uk

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- o trends in household formation rates since 1981, taking account of household composition as recorded by the 1991 and 2001 Censuses.

11. 2003-based ONS Population Projections

11.1 On 22 July 2004 ODPM announced that it was ceasing work on the 2002-based sub-national population projections and that it would instead immediately start work on 2003-based sub-national population projections. Official 2003-based sub-national population projections were published by ONS on 25 November 2004. The projections cover the period 2003-2028. These projections were not available in time to inform the preparation of the Draft South East Plan.

Table 11.1: ONS 2003-based Sub-National Population Projections

	2003	2028	Change 2003 to 2028
South East			
Persons	8,080,300	9,222,100	1,141,800
of which:			
Natural Change			332,000
Total Net Migration			809,800
of which:			
Net Migration from the rest of England			420,800
Net Migration from other parts of the UK outside England and from the rest of the world			389,000

11.2 The level of population growth projected for the South East over the twenty-five years 2003 to 2028 is just over 1.14 million persons, equivalent to an annual average of 45,700. The level of population growth projected for the South East in the Government's previous (1996-based) projections was just over 1 million, equivalent to an annual average of 40,400. The higher level of population growth now projected is due entirely to natural change, with slightly higher numbers of births compared to the 1996-based projections and substantially fewer deaths. Table 11.2 shows the percentage change in population by age and gender in the 1996-based and 2003-based population projections.

11.3 Projected overall net migration for the South East is unchanged between the two most recent sets of official projections, though the balance between net migration from the rest of England and net migration from the UK outside England and from the rest of the world has shifted. The 2003-based projections show higher net migration from the rest of the world outside the UK and lower net migration from the rest of England compared with the 1996-based projections. Net migration from the rest of England is highest amongst the 25-49 age groups and in the

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youngest age groups. Net migration from the UK outside England and from the rest of the world is highest in the 15-34 age groups.

Table 11.2: Percentage Change in Population by Age & Gender

	1996-based 1996-2021	2003-based 2003-2028		1996-based 1996-2021	2003-based 2003-2028
South East					
Males			Females		
Ages 0-15	-1.2	1.1	Ages 0-15	-1.4	1.8
Ages 16-29	-1.4	6.1	Ages 16-29	-0.9	5.9
Ages 30-44	-5.4	0.0	Ages 30-44	-3.0	-3.0
Ages 45-64	36.0	15.6	Ages 45-64	30.3	16.5
Ages 65-74	52.8	50.5	Ages 65-74	36.5	43.4
Ages 75-84	54.3	75.2	Ages 75-84	21.2	41.6
Ages 85 plus	84.3	166.9	Ages 85 plus	23.5	66.3
All Ages	14.3	15.1	All Ages	11.4	13.2

Table 11.3: ONS 2003-based Population Projections, Net Migration Age Structure

	Net Migration from the rest of England	Net Migration from other parts of the UK outside England and from the rest of the world
South East		
Age Group		
Ages 0-4	90.6	25.4
Ages 5-9	44.7	4.8
Ages 10-14	33.2	15.8
Ages 15-19	-84.8	98.7
Ages 20-24	-57.0	128.1
Ages 25-29	32.8	122.8
Ages 30-34	124.2	24.6
Ages 35-39	107.4	10.1
Ages 40-44	57.4	-14.0
Ages 45-49	27.9	-8.3
Ages 50-54	7.8	-10.5
Ages 55-59	-4.5	0.0
Ages 60-64	-6.6	-16.2
Ages 65-69	-5.3	13.2
Ages 70-74	11.1	-5.3
Ages 75-79	13.5	0.0
Ages 80-84	13.5	0.0
Ages 85 plus	15.2	0.0
All Ages	420.8	389.0

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11.4 Table 11.4 compares the ONS 2003-based sub-national population projections with the draft 2002-based sub-national projections used by the Regional Assembly to generate its projections. It shows that projected population growth is 52,000 higher in the 2003-based projections than in the draft 2002-based projections.

Table 11.4: 2002-based Draft and 2003-based Sub-National Population Projections

	Population Change 2002-2027		Difference
	2002-based	2003-based	2003 minus 2002
South East			
Persons	1,085,300	1,137,500	52,200

12. 2003-based ODPM Household Projections

12.1 On 14 March 2006, the Government published 2003-based household projections. These projections were not available in time to inform the preparation of the Draft South East Plan.

Table 12.1: ODPM 2003-based Household Projections (thousands)

	2001	2003	2006	2011	2016	2021	2026
South East							
Household types:							
married couple	1,660	1,644	1,616	1,584	1,568	1,563	1,556
cohabiting couple	299	310	359	429	487	532	570
lone parent	191	202	211	222	228	232	237
other multi-person	205	208	212	223	236	245	252
one person	940	984	1,046	1,168	1,304	1,441	1,570
All households	3,294	3,348	3,445	3,626	3,822	4,013	4,184
Private household population	7,833	7,890	8,017	8,239	8,469	8,705	8,925
Average household size	2.38	2.36	2.33	2.27	2.22	2.17	2.13
England							
All households	20,523	20,904	21,485	22,566	23,705	24,781	25,713

12.2 The projections show that if past short-term demographic trends were to continue in to the future, the number of households in the South East would increase by 739,000 over the period covered by the South East Plan, from 3,445,000 in 2006 to 4,184,000 in 2026 (or 21.5 per cent). This is equivalent to an annual average of around 36,950 households. One person households account for 71 per cent of the growth. Numbers of married couple households are projected

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to fall, but there are projected increases in numbers of cohabiting households, lone parent households and other multi person households.

13. Regional Assembly's Fourth Round of Population and Household Projections

13.1 Since the submission of the South East Plan, two further sets of population and household projections have been prepared for the South East England Regional Assembly by Anglia Ruskin University (formerly Anglia Polytechnic University). The first set of projections is dwelling-based, with the fundamental controlling assumption being total regional housing provision and the district level housing distribution set out in South East Plan Policy H1 (together with actual dwelling completions for the period 2001-2006). The second set of projections is based on zero net migration 2001-2026. The other assumptions used in the projections are set out in Annex 4 of this note.

Table 13.1: Projection based on South East Plan Housing Provision (Fourth Round)

	2001	2006	2011	2016	2021	2026
South East						
Total Population	8,025,500	8,200,357	8,369,600	8,488,413	8,611,802	8,773,237
Private Household Population	7,834,658	8,004,593	8,168,890	8,282,373	8,396,956	8,545,551
Households	3,295,820	3,433,346	3,577,116	3,717,139	3,855,649	3,994,150
Average Household Size	2.38	2.33	2.28	2.23	2.18	2.14
Dwellings	3,400,418	3,542,247	3,690,512	3,834,891	3,977,592	4,120,280
Labour Supply (Mid Variant)	4,053,796	4,181,437	4,316,601	4,393,059	4,461,546	4,449,964

Table 13.2: Nil Net Migration Projection (Fourth Round)

	2001	2006	2011	2016	2021	2026
South East						
Total Population	8,025,500	8,088,647	8,135,932	8,174,264	8,207,947	8,228,277
Private Household Population	7,834,658	7,893,381	7,936,182	7,969,503	7,994,847	8,003,185
Households	3,295,820	3,391,476	3,487,167	3,594,521	3,697,606	3,779,320
Average Household Size	2.38	2.33	2.28	2.22	2.16	2.12
Dwellings	3,400,418	3,498,04	3,597,037	3,707,390	3,813,311	3,897,106
Labour Supply (Mid Variant)	4,053,796	4,116,107	4,181,354	4,215,999	4,235,039	4,142,291

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Sub-regional projections

- 13.2 Projected population and household growth based on planned housing provision was calculated for each of the sub-regional areas and for each of the remaining county areas. These are not true sub-regional projections but have been derived from projections for each district and unitary area in the region. A detailed explanation of the methodology used to arrive at the projections for each sub-regional area and each of the remaining county areas is set out in Annex 5. Note, the methodology and sub-regional geography are different from that set out in Annex 3 and used to provide sub-regional estimates for the Assembly's third round demographic projections.

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Table 13.3: Dwelling-based Demographic Projections – Sub-Regions

	2001	2006	2011	2016	2021	2026
Central Oxfordshire						
Population	388,698	399,051	410,461	417,668	423,965	431,819
Households	153,318	159,752	168,029	176,300	184,568	192,837
Dwellings	157,596	164,212	172,724	181,231	189,736	198,238
Labour Supply Mid-Variant	197,080	204,049	212,106	217,106	220,892	219,850
East Kent & Ashford						
Population	578,175	593,993	605,592	612,349	616,265	624,609
Households	243,235	254,653	266,750	278,848	286,613	300,592
Dwellings	256,089	268,072	280,733	293,395	301,542	316,128
Labour Supply Mid-Variant	261,764	273,757	283,084	287,573	289,216	286,753
Gatwick						
Population	317,189	323,679	340,303	355,745	370,712	386,282
Households	128,981	133,707	141,788	149,867	157,958	166,037
Dwellings	131,679	136,516	144,776	153,033	161,301	169,558
Labour Supply Mid-Variant	174,656	178,981	188,554	196,682	204,219	207,507
Isle of Wight						
Population	132,700	130,774	130,419	129,249	128,570	128,908
Households	57,571	59,381	61,817	64,255	66,691	69,130
Dwellings	61,504	63,437	66,039	68,644	71,247	73,852
Labour Supply Mid-Variant	58,174	58,335	59,103	58,692	57,937	56,043
Kent Thames Gateway						
Population	471,758	474,842	485,406	493,531	503,773	518,274
Households	189,423	197,389	209,204	221,016	232,529	244,181
Dwellings	194,906	203,102	215,245	227,386	239,198	251,152
Labour Supply Mid-Variant	249,072	255,270	263,268	266,427	270,212	271,023
London Fringe						
Population	824,550	833,158	838,922	841,401	843,844	849,384
Households	338,381	350,055	359,243	368,426	377,605	386,790
Dwellings	347,036	359,007	368,427	377,838	387,249	396,665
Labour Supply Mid-Variant	440,119	447,639	455,936	460,483	463,972	456,814
Milton Keynes/Aylesbury Vale						
Population	379,000	391,959	429,557	455,847	482,195	510,871
Households	149,638	159,212	178,458	194,435	210,415	226,978
Dwellings	154,320	164,207	184,106	200,604	217,106	234,215
Labour Supply Mid-Variant	206,333	215,395	239,363	254,210	269,122	281,327
South Hampshire						
Population	952,543	967,463	987,754	1,003,984	1,026,584	1,052,955
Households	393,085	409,817	429,753	449,230	468,877	487,926
Dwellings	403,667	420,846	441,300	461,297	481,398	500,876
Labour Supply Mid-Variant	465,238	481,654	496,372	499,075	508,041	510,491

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	2001	2006	2011	2016	2021	2026
Sussex Coast						
Population	977,540	996,705	1,004,423	1,007,125	1,011,011	1,019,539
Households	435,897	451,210	464,155	477,104	490,049	503,005
Dwellings	453,009	468,949	482,443	495,935	509,427	522,929
Labour Supply Mid-Variant	455,559	476,317	488,889	493,892	496,164	487,604
Western Corridor & Blackwater Valley						
Population	1,374,850	1,419,219	1,450,722	1,477,515	1,505,488	1,538,490
Households	542,134	567,219	589,082	610,951	632,831	654,707
Dwellings	555,765	581,448	603,826	626,211	648,603	670,993
Labour Supply Mid-Variant	750,201	776,852	797,441	811,473	826,460	827,834

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Table 13.4: Dwelling-based Demographic Projections – Remaining County Areas

	2001	2006	2011	2016	2021	2026
Rest of Berkshire						
Population	15,313	16,111	16,576	16,994	17,428	17,944
Households	6,094	6,458	6,702	6,946	7,191	7,435
Dwellings	6,229	6,601	6,850	7,100	7,350	7,599
Labour Supply Mid-Variant	5,000	5,260	5,458	5,612	5,753	5,791
Rest of Buckinghamshire						
Population	124,082	126,325	127,743	129,598	131,656	133,986
Households	48,961	50,080	50,691	51,302	51,913	52,521
Dwellings	50,326	51,474	52,104	52,732	53,361	53,986
Labour Supply Mid-Variant	57,500	57,658	58,006	58,703	59,828	60,089
Rest of East Sussex						
Population	129,112	130,553	132,609	133,633	134,445	135,813
Households	54,867	55,904	57,332	58,760	60,188	61,619
Dwellings	57,480	58,569	60,065	61,559	63,055	64,553
Labour Supply Mid-Variant	64,418	64,716	66,543	67,490	68,097	67,027
Rest of Hampshire						
Population	397,063	409,216	411,323	411,927	410,720	410,834
Households	162,192	169,515	173,378	177,216	181,094	184,981
Dwellings	167,087	174,622	178,594	182,543	186,530	190,526
Labour Supply Mid-Variant	207,149	212,984	216,154	221,063	220,411	213,841
Rest of Kent						
Population	493,412	507,076	511,314	513,178	514,587	519,377
Households	200,097	209,737	215,714	221,816	227,421	233,029
Dwellings	205,461	215,361	221,498	227,763	233,520	239,277
Labour Supply Mid-Variant	230,162	236,214	241,599	244,649	247,406	245,820
Rest of Oxfordshire						
Population	218,294	222,499	224,041	223,067	221,720	221,749
Households	88,074	91,759	94,948	98,135	101,321	104,509
Dwellings	91,019	94,831	98,125	101,420	104,714	108,008
Labour Supply Mid-Variant	120,991	123,293	127,850	130,118	131,475	129,934
Rest of Surrey						
Population	141,434	144,078	146,415	147,735	148,503	149,442
Households	57,815	59,220	60,338	61,458	62,575	63,691
Dwellings	59,369	60,812	61,961	63,112	64,260	65,406
Labour Supply Mid-Variant	68,806	70,009	71,893	73,304	74,456	73,942
Rest of West Sussex						
Population	109,778	113,649	115,938	117,965	119,974	122,463
Households	46,056	48,276	49,707	51,137	52,575	54,008
Dwellings	47,874	50,179	51,667	53,154	54,650	56,140
Labour Supply Mid Variant	41,431	42,911	44,839	46,359	47,738	48,128

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Annex IA

Migration between the South East and the rest of the UK

Draft South East Plan Table B.2: Migration to and from the South East

	mid –1996 to 2001	mid –1998 to 2003
To/from South East		
North East	2,500	-300
North West	5,700	-1,400
Yorkshire and Humber	500	-6,900
East Midlands	-17,700	-28,500
West Midlands	100	-5,700
East of England	4,800	3,400
London	161,200	190,500
South West	-60,400	-72,500
Wales	-4,000	-10,100
Scotland	1,200	-3,900
Northern Ireland	300	200
UK	93,800	64,800

Migration to and from the South East 2004 & 2005

	2004	2005
To/from South East		
North East	-800	-300
North West	-2,000	-1,000
Yorkshire and Humber	-2,400	-1,500
East Midlands	-5,500	-3,800
West Midlands	-1,900	-1,500
East of England	2,600	2,300
London	44,200	36,900
South West	-12,900	-11,000
Wales	-2,900	-1,900
Scotland	-2,400	-2,600
Northern Ireland	-400	-200
UK	15,300	15,300

Positive figures indicate net in-migration to the South East; negative figures indicate net out-migration from the South East.

Source: NHSCR

Totals may not sum due to rounding.

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Annex IB

International Migration Flows to/from the South East

International Migration Flows to and from the South East (thousands)

	Inflow	Outflow	Net
2000	64.3	64.4	-0.1
2001	65.3	50.1	15.1
2002	68.5	60.1	8.4
2003	69.4	52.9	16.5
2004	71.0	56.1	14.9
Average	67.7	56.7	11.0

Source: International Passenger Survey

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Annex 2

2001-Based Long-term Migration (Chelmer) Projection: Underlying Assumptions

Disaggregate head/hhold rep rates	(D)SEERA census based
Mig. disagg. head/hhold rep rates	(D)SEERA census based
Marital/Cohabital status	(D)SEERA census based
Mig. marital/cohab status	(D)SEERA census based
Migrant age/sex	(D)CENSUS91 FROM SPEC MIGN STATS(rev)
Internat. migration profile	Intnetmign prof GAD 2001-6
Vacancy rates	(D)Dwlvac Cen2001 HolAcc/2ndHom.
Sharing factors	(D)Census2001 (Table S048)
Base population	(D)ONS MYE 2001,E/Wrev06Nov03
Institute population	(D)Cen2001 inst + trans + serv
Fertility rates	2001-2036; ENGLAND 2002-based (ONS/GAD)
Mortality rates	2001-2036; ENGLAND 2002-based (ONS/GAD)
Infant mortality rates	2001-2036; ENGLAND 2002-based (ONS/GAD)
Local correction factors	(D)GAD02 b/dthcor;Reg.dea/bir ONS 97-02
Institute marital status	(D)SEERA census based
Net Migrants control	(D)Rev Nov03 MYE91-MYE01 Residual
Total intrn. net migrants	(D)ONS 91-01 (AdjRevIntntlNmig)
Control type	NET MIGRANTS

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Annex 3

Methodology for Arriving at Projections for Sub-Regions and Remaining County Areas for Regional Assembly's Third Round of Population and Household Projections

1. The following text explains the approach taken to divide the demographic projections and employment forecasts by ward population and economic activity.

Calculating the proportional splits

2. The proportions of the area of wards that are within and outside sub-regions were calculated for each local authority. Using these proportions, the percentage of the population (taken from the population base as at April 2001 from the Census of the Population) resident within each part of each ward, and the percentage of the economically active (taken from the Annual Business Inquiry 2002 workplace based analysis) within each part of each ward has been calculated. Population at 2001 has been used to split the demographic projections, ie. population, dwellings, households and labour supply. Economic activity in 2002 has been used in the same way to split employment forecasts (employment demand).
3. For example, if Ward A has 20 per cent of its land area within sub-region X and 80 per cent of its land area is not within any sub-region, we assume that 20 per cent of Ward A's population/economically active is resident in sub-region X and 80 per cent of its population/economically active is not resident in any sub-region.
4. The above example has been run for each sub-region in the South East. This has resulted in a set of wards for each sub-region that detail the proportion of land area and population or economically active people of each ward that fall both within and outside the relevant sub-region. The figure for the percentage of people within the sub-region is then totalled for each local authority and subsequently used to calculate the total number of people not inside the sub-region for each local authority.
5. For example, if the total number of people in wards in local authority B that are within sub-region X is 2,500, this value is transferred to local authority B. This value is then subtracted from the absolute total number of people in local authority B (calculated by aggregating the population/economically active of all wards within local authority B) to provide the number of people not within sub-region X.
6. The above example results in a figure representing the total number of people in each local authority within a sub-region for each sub-region. It also results in the total number of people in each local authority not within a sub-region for each sub-region. From those two values, the proportion of the total population/economically active is calculated for each local authority. This gives us,

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for each sub-region, the proportions for each local authority that can then be applied to the projections and forecasts.

7. For example, the resulting table of information would look like this:

Sub-region X

Local Authority	Total Population	Population Within	Population Outside	% Population Within	% Population Outside
B	1000	200	800	20	80
C	2000	500	1500	25	75
D	3000	600	2200	20	80
E	4000	200	3800	2	95

8. For local authority B we would assume that 20 per cent of, for example, the projected households for each five year interval are within sub-region X and use this value to derive the number of households within sub-region X for each five year interval. This calculation is run on each local authority within sub-region X for both numbers within and numbers outside sub-region X. These two sets of figures are then totalled, providing the total number of households within and outside sub-region X.
9. The above examples provide us with the sub-regional figures for demographic projections and employment forecasts within and outside each sub-region.

Calculating projections for the remaining county areas

10. Some local authorities in the South East fall partly within more than one sub-region. To calculate the projections for the other county areas, we need to ensure that we take the total number of population/economically active within any sub-region for each local authority and subtract it from the total population/economically active for each local authority.
11. For example, if local authority B has 20 per cent of people within sub-region X and 30 per cent within sub-region Y, we assume that 50 per cent of the population in local authority B fall within a sub-region and 50 per cent do not fall within any sub-region. The projections and forecasts for each local authority are then split accordingly.
12. The local authorities are then grouped by 'virtual county' (county plus relevant unitary authority or in the case of Berkshire all six unitary authorities). The figures calculated for each projection/forecast are totalled to provide a measure of, for example, the number of dwellings within a sub-region and the number of dwellings outside a sub-region for each administrative county area. The total number outside a sub-region is presented as the figure for the remaining county area.

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Annex 4A

**Dwelling-Based (Chelmer) Projection (Regional Assembly Fourth Round):
Underlying Assumptions**

Disaggregate head/hhold rep rates	(D)ODPM/ONS 2003-based
Mig. disagg. head/hhold rep rates	(D)ODPM/ONS 2003
Marital/Cohabital status	(D)ODPM/ONS 2003
Mig. marital/cohab status	(D)ODPM/ONS 2003
Migrant age/sex	(D)Some adj priv+inst Cen2001 (UK)
Internat. migration profile	(D)Cen01 in;ONS03-based local net rev(E)
Vacancy rates	(D)Dwlvac Cen2001 HoIAcc/2ndHom.
Sharing factors	(D)Census2001 (Table S048)
Base population	(D)ONS MYE2001,E/W 06Sep04
Institute population	(D)Cen2001 nondom+nondom75+serv
Fertility rates	ENGLAND 2004-based (ONS/GAD); 2001-2041
Mortality rates	ENGLAND 2004-based (ONS/GAD); 2001-2041
Infant mortality rates	ENGLAND 2004-based (ONS/GAD); 2001-2041
Local correction factors	(D)GAD04 b/dcor;Reg dea/bir ONS 99-04
Composite participations	(D)Econ.Act.2001 (MidVar CE/CCC. 06/21)
Institute marital status	(D)ODPM/ONS 2003-based
Dwelling control	(D)SEERA 28,900 p.a.
Total intrn. net migrants	(D)ONS 98-03
Control type	DWELLING TARGETS

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Annex 4B

**(Chelmer) Nil-Net Migration Projection (Regional Assembly Fourth Round):
Underlying Assumptions**

Disaggregate head/hhold rep rates	(D)ODPM/ONS 2003-based
Mig. disagg. head/hhold rep rates	(D)ODPM/ONS 2003
Marital/Cohabital status	(D)ODPM/ONS 2003
Mig. marital/cohab status	(D)ODPM/ONS 2003
Migrant age/sex	(D)Some adj priv+inst Cen2001 (UK)
Internat. migration profile	(D)Cen01 in;ONS03-based local net rev(E)
Vacancy rates	(D)Dwlvac Cen2001 HoIAcc/2ndHom.
Sharing factors	(D)Census2001 (Table S048)
Base population	(D)ONS MYE2001,E/W 06Sep04
Institute population	(D)Cen2001 nondom+nondom75+serv
Fertility rates	ENGLAND 2004-based (ONS/GAD); 2001-2041
Mortality rates	ENGLAND 2004-based (ONS/GAD); 2001-2041
Infant mortality rates	ENGLAND 2004-based (ONS/GAD); 2001-2041
Local correction factors	(D)GAD04 b/dcor;Reg dea/bir ONS 99-04
Composite participations	(D)Econ.Act.2001 (MidVar CE/CCC. 06/21)
Institute marital status	(D)ODPM/ONS 2003-based
Intn. net migrants	(D) Zero intnatmign
Control type	ZeroNetMign

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Annex 5

Methodology for Arriving at Projections for Sub-Regions and Remaining County Areas for Regional Assembly's Fourth Round of Population and Household Projections

1. This annex explains the approach taken to divide the demographic projections for sub-regions (by ward housing stock and economic activity)

Calculating the proportional splits for demographic projections

2. The proportions of the area of wards that are within and outside sub-regions have been calculated for each local authority. Using these proportions, the percentage of the existing housing stock (as at April 2001 from the Census) within each part of each ward has been calculated.
3. For example, if Ward A has 20 per cent of its land area within sub-region X and 80% of its land area is not within any sub-region, we assume that 20% per cent of Ward A's housing stock is in sub-region X and 80% of its housing stock is not within any sub-region.
4. The above example has been run for each sub-region in the South East. This has resulted in a set of wards for each sub-region that detail the proportion of land area and housing stock of each ward that fall both within and outside the relevant sub-region. The figure for number of housing stock within the sub-region is then totalled for each local authority and subsequently used to calculate the total number of housing stock not inside the sub-region for each local authority.
5. For example, if the total number of housing stock in wards in local authority B that are within sub-region X is 2,500, this value is transferred to local authority B. This value is then subtracted from the absolute total number of housing stock in local authority B (calculated by aggregating the housing stock of all wards within local authority B) to provide the number of people not within sub-region X. Proportions for totals inside and outside are then calculated.
6. The resulting figure is then used to split the projections for 2001.
7. Further to this, the land area proportions have been used in the same way to calculate the net completions for the years 2001 to 2005 that have occurred within and outside the sub-region for each local authority. These totals have then been added to the Census housing stock, to give a realistic estimate of total housing stock at 2005. The resulting numbers are then used to derive the proportion of total housing stock within and outside a particular sub-region for each local authority for the year 2006.
8. The final figure as calculated above has been used to split the household, dwelling and population and economically active projections for 2006. After 2006, an additional step is introduced.

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9. The dwelling distributions set out in the South East Plan must be taken into account when splitting projections for 2007 onwards. For the year 2011, the annual average distribution is multiplied by five and added to the local authority totals within and outside the sub-regions. The multiplication factor is increased for each five year period to reflect the dwellings built should the Plan distribution be met on an annual basis. Where local authorities have proposed a phased rate, these have been taken into account. Proportions are subsequently calculated and used to split each five year period projection (2001, 2016, 2021 and 2026).
10. Where a local authority has distributions in more than one sub-region, those are taken into account when calculating the proportions within a sub-region: if local authority C has 200 dwellings within sub-region Y, 300 in sub-region Z and 500 outside any sub-region, 200 are said to be within sub-region Y and 800 outside sub-region Y (so 20% inside and 80% outside – only the percentage inside is important, as the percentage outside is derived from totals within any sub-region).
11. The table at the end of this annex illustrates the figures calculated to derive a proportion split for each five year period.

Calculating the county residuals

12. Some local authorities in the South East fall partly within more than one sub-region. To calculate the county residuals, we need to ensure we take the total number of housing within any sub-region for each local authority and subtract it from the total housing for each local authority.
13. For example, if local authority B has 20% of housing within sub-region X and 30% within sub-region Y, we assume that 50% of the housing in local authority B fall within a sub-region and 50% do not fall within any sub-region. The projections for each local authority are then split accordingly.
14. The local authorities are then grouped by 'virtual county' (county plus relevant unitary authority or in the case of Berkshire all six unitary authorities). The figures calculated for each projection are totalled to provide a measure of, for example, the number of dwellings within a sub-region and the number of dwellings outside a sub-region for each virtual county area. The total number outside a sub-region is presented as the county residual.

Definitions

15. For the demographic projections, the following variables have been split:

Household: A household is defined as one person living alone, or a group of people (not necessarily related) living at the same self-contained unit of accommodation.

Dwelling: A self-contained unit of accommodation. Self-containment is where all the rooms (including kitchen, bathroom and toilet) in a household's accommodation are behind a door, which only that household can use. Non-self contained household spaces at the same address should be counted together as a single dwelling. Therefore a dwelling can consist of one self-contained household space or two or more non-self-contained household spaces at the same address.

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Population: Count of the number of people usually resident within the local authority.

Economically Active (Participation) – referred to as Labour Supply: The number of people who supply, or want to supply, their labour to produce goods and services. This is defined as those who are either employed or unemployed, but not economically inactive.

16. To split the above variables, the following datasets have been used:

Housing stock: Household space - a unit of accommodation with its own kitchen or cooking facilities; occupied and unoccupied (second residence/holiday home and vacant spaces included) have both been counted at ward level.

Completions: Total net dwelling completions, including conversions and change of use, at local authority level.

Annual average dwelling distribution: The annual net dwelling requirement as set out in Section E of the South East Plan.

Changes to sub-regional boundaries

17. A number of the sub-regions' boundaries have changed since the third round projections and forecasts were commissioned and split in 2004. This will result in the 2006 split projections and forecasts not being directly comparable to the 2004 figures in those cases. The changes made to boundaries between 2004 and 2006 are outlined below:

Central Oxfordshire: Extended very small area in South Oxfordshire to include RAF Benson.

East Kent and Ashford: Boundary extended in Swale up to the village of Conyer, to flank the Kent Thames Gateway boundary.

Kent Thames Gateway: Amended to reflect the standard Thames Gateway boundary within the South East, ie. remove majority of Maidstone and Tonbridge and Malling and significantly reduce areas in Medway, Gravesham, Dartford plus a smaller area of Swale.

Western Corridor and Blackwater Valley: Removed all parts of South Oxfordshire and Waverley. Amended the boundary in the south to reduce extent in Basingstoke and Deane and Hart.

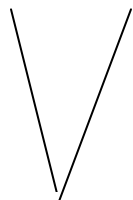
Gatwick Area, London Fringe, Milton Keynes and Aylesbury Vale, South Hampshire and Sussex Coast: No changes.

Used to calculate split for 2001

Local Authority	Total Housing stock	Housing stock within	Housing stock outside	Proportion housing stock within	Proportion housing stock outside	Net completions 2001-2005	Net completions 2001-2005 within	Net completions 2001-2005 outside	Total Housing Stock within	Total Housing Stock outside	Total housing stock
A	50,000	10,000	40,000	20%	80%	2,500	500	2,000	10,500	42,000	52,500

% Housing Stock within	% Housing Stock outside	Annual average distribution within	Annual average distribution outside	Ann. Average 2006-2011 within	Ann. Average 2006-2011 outside	Total within	Total outside	Total	2011 Proportion within	2011 Proportion outside
20%	80%	300	150	1,500	750	12,000	42,750	54,750	22%	78%

Used to calculate split for 2011



Used to calculate split for 2006

Ann. Average 2012-2016 within	Ann. Average 2012-2016 outside	Total within	Total outside	Total	2016 Proportion within	2016 Proportion outside
3,000	1,500	13,500	43,500	57,000	24%	76%

Used to calculate split for 2016

Ann. Average 2017-2021 within	Ann. Average 2020-2021 outside	Total within	Total outside	Total	2021 Proportion within	2021 Proportion outside
4,500	2,250	15,000	44,250	59,250	25%	75%

Used to calculate split for 2021

NB: There was also a calculation for 2026